



Pre-Retirement Planning Seminar

Target Audience: Civilian employees serviced by Personnel and Employment Service-Washington within 5 years of retirement eligibility.

Cost: \$140.00 Cost includes seminar materials.

Description: This class covers everything you need to know and to plan for a successful retirement. All aspects of FERS and CSRS are covered including survivor annuity, FEHB, FEGLI, Social Security & Medicare, annuity calculation, best date to retire, financial estate, legal planning, income tax planning, health and fitness concerns, second career, life after retirement, and the TSP. Questions are encouraged by all speakers!

Course Objectives: After completing this class seminar, attendees will:

- Have an understanding of their benefits package;
- Be able to redefine or fine-tune plans already made;
- Understand TSP withdrawal options;
- Understand the need for wills, trusts, powers-of-attorney, and health care directives;
- Understand the best time to retire from a benefits and tax standpoint; and
- Be able to make significant retirement decisions.

Training Methods: Presenter will use a mix of training methods to include: lecture, case studies, class quizzes, interactive exercises, and Q&A times.

Training Dates/Times: November 19 – 21, 2002 February 18 – 20, 2003
June 10 – 12, 2003 September 16 – 18, 2003
Time: 0830 - 1530

Location: George Mason University, Arlington Campus Professional Center
3401 North Fairfax Drive, Arlington, Va
Metro: Virginia Square, Orange Line

Nomination Deadline: NLT 30 days prior to start of seminar

To Enroll: Submit a completed DD Form 1556 to your Activity Training Coordinator. Block 19: National Institute of Transition Planning, 51 Monroe Street, Suite 1900, Rockville, Maryland 20850. No one is selected for this course until they receive a confirmation from the P&ES-W, Human Resource Development Office. Please print your email address in Block #18 of the DD Form 1556. Confirmations will be sent to you via email three weeks prior to the start of the seminar.

Cancellation Policy: NITP policy states: Applicant may cancel 2 weeks prior to start date; after this date, full payment from organizations will be charged. Vendor requires a minimum of 25 students and reserves the right to cancel if fewer students are enrolled 2 weeks prior to start date.

For further information, please contact the training help desk at PESWTraining@hqda.army.mil.